

## Overview

*Last updated: 27-June-2014*

This document describes how to correctly format an inbound email for processing by WorksIQ CRM.

Emails can be used to automatically create Leads, Incidents, Contacts and Companies within the system.

An example of a suitably formatted email can be found at the end of the document.

## Specification

A formatted email must contain the line:

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This can be followed by entries for company, contact, lead, incident or history rows (there can be entries for one or zero of each entity type).

The entries for each entity type are described below.

Each line must be of the format:

keyword: value

Where keyword is listed in the sections below, and value must be of the appropriate type for the field, e.g. status must be a number.

Most text fields are single line, but some are multi-line. Any multi-line field must be terminated by another keyword entry, or by a line starting with at least 5 dashes (hyphens), e.g. -----

## Contact Fields

A contact will be created if the email contains either the line Contact:1 (for Prefix/FirstName/MiddleName/LastName/Suffix combination) or Contact:2 (for FullName version).

Note: all keywords are followed by a colon (no space between keyword and colon).

Keyword	Type	Description	Max Size	Default Value
Contact:1				
Prefix:	string	Prefix of contact, e.g. Mr		Blank
FirstName:	string	First name of contact	50	Blank
MiddleName:	string	Middle name of contact	50	Blank
LastName:	string	Last name of contact	50	"Unknown"
Suffix:	string	Suffix of contact, e.g. BSc	50	Blank

Contact:2				
FullName:	string	Full name of contact. This will be parsed. The parsing routine will attempt to extract known prefixes, e.g. Mr, Mrs, Dr, and suffixes, e.g. BSc, Esq.	See above	Last name will be "Unknown", other name fields will be blank.

Email:	string	Email address of contact	100	Blank
EmailOther:	string	Additional email address	100	Blank
Phone:	string	Telephone number	50	Blank
PhoneOther:	string	Additional telephone number	50	Blank
Mobile:	string	Mobile telephone number	50	Blank
MobileOther:	string	Additional mobile number	50	Blank
ContactCustomDate1:	datetime	Tenant dependent.	See notes	Null
ContactCustomDate2:	datetime	Tenant dependent	See notes	Null
ContactCustomDate3:	datetime	Tenant dependent	See notes	Null
ContactCustomInteger1:	integer	Tenant dependent	See notes	Null
ContactCustomInteger2:	integer	Tenant dependent	See notes	Null
ContactCustomInteger3:	integer	Tenant dependent	See notes	Null
ContactCustomDecimal1:	decimal	Tenant dependent	See notes	Null
ContactCustomDecimal2:	decimal	Tenant dependent	See notes	Null
ContactCustomDecimal3:	decimal	Tenant dependent	See notes	Null
ContactCustomText1:	string	Tenant dependent	See notes	Empty
ContactCustomText2:	string	Tenant	See	Empty

		dependent	notes	
ContactCustomText3:	string	Tenant dependent	See notes	Empty
ContactCustomPickList1:	integer	Tenant dependent	See notes	Null
ContactCustomPickList2:	integer	Tenant dependent	See notes	Null
ContactCustomPickList3:	integer	Tenant dependent	See notes	Null
JobTitle:	string	Job Title	100	Empty
ContactWebAddress:	string	URL to contact website	100	Empty
LinkedIn:	string	Linked In address	256	
ContactSource:	smallint	Code from the Contact Source pick list	See notes	Null
ContactCategory:	smallint	Code from the Contact Category pick list	See notes	Null
ContactAssignedTo:	int	Id of the tenant user to which this contact is assigned.	See notes	Null
ContactNextAction:	string	Next action description	255	Empty
ContactNextActionDate:	datetime	Date and time of next action	See notes	Null
SalesAlert:	bit	If set to 'true', sales alerts will be generated when this user	True False	true

		accesses your enabled website.		
ContactHistoryText:	string	A contact history is created if there is no lead or incident created (otherwise the history is associated with the lead or incident.		"Contact created from email"

The following fields are automatically populated by the system:

Contact Id, CompanyId, CreatedOn, ImportDate, Cookield, AddressId, Deleted, CookieTagged

## Contact Address Fields

A contact address will be created if the email contains the line **ContactAddress:1**

Note: if you are also creating a company, you may want to associate the address with the company rather than the contact. See Company Address Fields later.

Note: all keywords are followed by a colon (no space between keyword and colon).

Keyword	Type	Description	Max Size	Default Value
ContactAddressTitle:	string	Title of the address, e.g. Head Office	50	Blank
ContactAddress1:	string	Address line 1	100	Blank

ContactAddress2:	string	Address line 2	100	Blank
ContactAddress3:	string	Address line 3	100	Blank
ContactAddressCity:	string	City	100	Blank
ContactAddressCounty:	string	County	100	Blank
ContactAddressPostCode:	string	Post code or zip code	20	Blank
ContactAddressCountry:	string	Country	100	Blank
ContactAddressPhone:	string	Telephone number	50	Blank

The following fields are automatically populated by the system:

Id, Primary, Deleted

## Lead Fields

A lead will be created if the email contains the line **Lead:1**

Note: all keywords are followed by a colon (no space between keyword and colon).

Keyword	Type	Description	Max Size	Default Value
LeadCustomDate1:	datetime	Tenant dependent.	See notes	Null
LeadCustomDate2:	datetime	Tenant dependent	See notes	Null
LeadCustomDate3:	datetime	Tenant dependent	See notes	Null
LeadCustomInteger1:	integer	Tenant dependent	See notes	Null
LeadCustomInteger2:	integer	Tenant dependent	See notes	Null
LeadCustomInteger3:	integer	Tenant dependent	See notes	Null
LeadCustomDecimal1:	decimal	Tenant dependent	See notes	Null

LeadCustomDecimal2:	decimal	Tenant dependent	See notes	Null
LeadCustomDecimal3:	decimal	Tenant dependent	See notes	Null
LeadCustomText1:	string	Tenant dependent	See notes	Empty
LeadCustomText2:	string	Tenant dependent	See notes	Empty
LeadCustomText3:	string	Tenant dependent	See notes	Empty
LeadCustomPickList1:	integer	Tenant dependent	See notes	Null
LeadCustomPickList2:	integer	Tenant dependent	See notes	Null
LeadCustomPickList3:	integer	Tenant dependent	See notes	Null
LeadSource:	smallint	Code from the Lead Source pick list	See notes	Null
LeadCategory:	smallint	Code from the Lead Category pick list	See notes	Null
LeadAssignedTo:	int	Id of the tenant user to which this contact is assigned.	See notes	Null
LeadNextAction:	string	Next action description	255	Empty
LeadNextActionDate:	datetime	Date and time of next action	See notes	Null
LeadType:	smallint	Code from the Lead Type pick list	See notes	Null
LeadProduct:	smallint	Code from the Lead Product pick list	See notes	Null

LeadDescription:	string	Description	2048	Email subject
LeadStatus:	smallint	Code from the lead status pick list	See notes	101
LeadStage:	smallint	Code from the lead stage pick list	See notes	101
LeadProbability:	smallint	Code from the lead probability pick list	See notes	Null
LeadValue:	money	The estimate value of the deal		Null
LeadRespondBy:	datetime	Date/time by which you should respond to the requester	See notes	Null
LeadEstimatedClose:	datetime	Expected close date	See notes	Null
LeadOpportunity:	bit	Set to True if this lead should be included in the sales forecast reports.	True False	False
LeadCommission:	money	The commission on the deal		Null
LeadObjective:	string		255	Empty
LeadClosedOn:	datetime	Date the lead was closed	See notes	Null
LeadRestartOn:	datetime	Not used	See notes	Null
LeadTitle:	string	Short	50	Email



		description of the lead		subject
LeadHistoryText:	string	Associated history item text	2048	"Lead created from email"

The following fields are automatically populated by the system (or not used):

Id, ContactId, GroupId, CreatedOn, ImportDate, Campaign, SearchEngine, Keywords, Referrer, LandingPage, ProductId, Deleted, ClosedOn

## Incident Fields

For Service Desk users only.

An incident will be created if the email contains the line **Incident:1**

Note: all keywords are followed by a colon (no space between keyword and colon).

Keyword	Type	Description	Max Size	Default Value
IncidentCustomDate1:	datetime	Tenant dependent.	See notes	Null
IncidentCustomDate2:	datetime	Tenant dependent	See notes	Null
IncidentCustomDate3:	datetime	Tenant dependent	See notes	Null
IncidentCustomInteger1:	integer	Tenant dependent	See notes	Null
IncidentCustomInteger2:	integer	Tenant dependent	See notes	Null
IncidentCustomInteger3:	integer	Tenant dependent	See notes	Null
IncidentCustomDecimal1:	decimal	Tenant dependent	See notes	Null
IncidentCustomDecimal2:	decimal	Tenant	See	Null

		dependent	notes	
IncidentCustomDecimal3:	decimal	Tenant dependent	See notes	Null
IncidentCustomText1:	string	Tenant dependent	See notes	Empty
IncidentCustomText2:	string	Tenant dependent	See notes	Empty
IncidentCustomText3:	string	Tenant dependent	See notes	Empty
IncidentCustomPickList1:	integer	Tenant dependent	See notes	Null
IncidentCustomPickList2:	integer	Tenant dependent	See notes	Null
IncidentCustomPickList3:	integer	Tenant dependent	See notes	Null
IncidentSource:	smallint	Code from the Incident Source pick list	See notes	Null
IncidentCategory:	smallint	Code from the Incident Category pick list	See notes	Null
IncidentAssignedTo:	int	Id of the tenant user to which this contact is assigned.	See notes	Null
IncidentNextAction:	string	Next action description	255	Empty
IncidentNextActionDate:	datetime	Date and time of next action	See notes	Null
IncidentType:	smallint	Code from the Incident Type pick list	See notes	Null
IncidentDescription:	string	Description	2048	Email subject
IncidentStatus:	smallint	Code from the Incident status	See notes	101

		pick list		
IncidentStage:	smallint	Code from the Incident stage pick list	See notes	101
IncidentProbability:	smallint	Code from the Incident probability pick list	See notes	Null
IncidentValue:	money	The estimate value of the deal		Null
IncidentRespondBy:	datetime	Date/time by which you should respond to the requester	See notes	Null
IncidentEstimatedClose:	datetime	Expected close date	See notes	Null
IncidentOpportunity:	bit	Not used	True False	False
IncidentCommission:	money	The commission on the deal		Null
IncidentObjective:	string		255	Empty
IncidentClosedOn:	datetime	Date the Incident was closed	See notes	Null
IncidentRestartOn:	datetime	Not used	See notes	Null
IncidentTitle:	string	Short description of the Incident	50	Email subject
IncidentHistoryText:	string	Associated history item text	2048	"Incident created from email"

The following fields are automatically populated by the system (or not used):

Id, ContactId, GroupId, CreatedOn, ImportDate, Campaign, SearchEngine, Keywords, Referrer, LandingPage, ProductId, Deleted, ClosedOn

## Company Fields

A company will be created if the email contains the line **Company:1**

Note: all keywords are followed by a colon (no space between keyword and colon).

Keyword	Type	Description	Max Size	Default Value
CompanyName:	string	Name of the company	100	Blank
CompanyShortName:	string	Short name of the company	100	CompanyName
CompanyCustomDate1:	datetime	Tenant dependent.	See notes	Null
CompanyCustomDate2:	datetime	Tenant dependent	See notes	Null
CompanyCustomDate3:	datetime	Tenant dependent	See notes	Null
CompanyCustomInteger1:	integer	Tenant dependent	See notes	Null
CompanyCustomInteger2:	integer	Tenant dependent	See notes	Null
CompanyCustomInteger3:	integer	Tenant dependent	See notes	Null
CompanyCustomDecimal1:	decimal	Tenant dependent	See notes	Null
CompanyCustomDecimal2:	decimal	Tenant dependent	See notes	Null
CompanyCustomDecimal3:	decimal	Tenant dependent	See notes	Null
CompanyCustomText1:	string	Tenant dependent	See notes	Empty
CompanyCustomText2:	string	Tenant	See	Empty

		dependent	notes	
CompanyCustomText3:	string	Tenant dependent	See notes	Empty
CompanyCustomPickList1:	integer	Tenant dependent	See notes	Null
CompanyCustomPickList2:	integer	Tenant dependent	See notes	Null
CompanyCustomPickList3:	integer	Tenant dependent	See notes	Null
CompanyWebAddress:	string	URL to company website	100	Empty
CompanyFaxNumber:	string	Fax number	50	Null
CompanyRegNumber:	string	Registration number	50	Null
CompanyIndustry:	smallint	Code from the Company Industry pick list	See notes	Null
CompanyAssignedTo:	int	Id of the tenant user to which this company is assigned.	See notes	Null
CompanyNextAction:	string	Next action description	255	Empty
CompanyNextActionDate:	datetime	Date and time of next action	See notes	Null
CompanySource:	smallint	Code from the Company Source pick list	See notes	Null
CompanyNotes:	string	Notes		Null

The following fields are automatically populated by the system:

Id, TypeId, Deleted, PrimaryAddressId, ImportDate

## Company Address Fields

A company address will be created if the email contains the line CompanyAddress:1

Note: if you are also creating a contact, you may want to associate the address with the contact rather than the company. See Contact Address Fields section.

Note: all keywords are followed by a colon (no space between keyword and colon).

Keyword	Type	Description	Max Size	Default Value
CompanyAddressTitle:	string	Title of the address, e.g. Head Office	50	Blank
CompanyAddress1:	string	Address line 1	100	Blank
CompanyAddress2:	string	Address line 2	100	Blank
CompanyAddress3:	string	Address line 3	100	Blank
CompanyAddressCity:	string	City	100	Blank
CompanyAddressCounty:	string	County	100	Blank
CompanyAddressPostCode:	string	Post code or zip code	20	Blank
CompanyAddressCountry:	string	Country	100	Blank
CompanyAddressPhone:	string	Telephone number	50	Blank

The following fields are automatically populated by the system:

Id, Primary, Deleted

## Notes

This section contains notes regarding data types, formats and for some individual fields.

### Custom Fields

A number of custom fields exist in the system, e.g. Contact CustomDate1, CustomDate2, etc. These fields can be populated from the email, but are only accessible to users if you have customised pages or reports.

### DateTime Fields

Due to the potential difficulty in distinguishing between different date formats, e.g. in the UK we use day / month / year and in the USA it is month / day / year, we recommend using a fixed format for dates and times, if possible.

The fixed formats accepted by the system are:

- yyyyMMddHHmmss
- yyyyMMddHHmm
- yyyyMMdd
- yyyyMMddHHmmssff

Where:

yyyy is the year, e.g. 2014

MM is the month, e.g. 01 = January, 02 = February, and so on

dd is the day of the month, e.g. 01, 02, ... 31

HH is the hours in 24 hours format, e.g. 00, 01, 02, ..., 22, 23

mm is the minutes, 00, 01, ..., 59

ss is the seconds, 00, 01, ..., 59

ff is the fraction of seconds, 00, 01, ..., 99

The system will attempt to parse any other format, but we cannot guarantee that the results will be as expected.

### Pick list Fields

Pick lists are dropdown fields in the system, where an administrator can define the values available to the users. Examples of pick lists are status, stage, source, category.

Each pick list entry has an associated code and a description. Users normally only see the description, but for email parsing we use the associated code (so that if the

description of the associated item changes, you don't have to change your emails to match).

To find the associated codes, the administrator will have to use the Admin tab and go to the Dropdown Configuration panels. By selecting the required dropdown (pick list), the list of codes and descriptions can be seen.



## Example Email

The example below shows a formatted email body. Some of the data could come from the form on the web page, e.g. company and contact names, while some is static, e.g. LeadStatus, CompanyAssignedTo.

```
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Contact: 1
Company: 1
CompanyAddress: 1
Lead: 1
```

```
CompanyName: New Company Ltd
CompanyWebAddress:www.newco.co.uk
CompanyFaxNumber:01344 788888
CompanyAddress1: New Company House
CompanyAddress2: Elite Business Park
CompanyAddress3:
CompanyAddressCity: Bracknell
CompanyAddressCounty: Berkshire
CompanyAddressPostCode:RG5 7BB
CompanyAddressCountry:United Kingdom
CompanyAddressPhone:01344 777777
CompanyAssignedTo:2
```

```
FirstName:Joe
LastName:Smith
Email:joe.smith@newco.co.uk
Mobile: 07777 7777777
ContactWebAddress: www.newco.co.uk
ContactSource: 201
ContactAssignedTo: 2
ContactNextAction: Respond
ContactNextActionDate: 20140131
SalesAlert:true
```

```
LeadSource: 107
LeadCategory: 12
LeadAssignedTo: 2
LeadNextAction: Respond
LeadNextActionDate:20140131
LeadType: 102
LeadDescription: I am interested in starting a free trial of your product, plus need pricing
for a 5 user system.
```

```
-----
LeadStatus: 101
LeadTitle: New trial request
CookieData: <cookie data from website>
-----
```